

Message Text

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FM AMEMBASSY BONN

TO SECSTATE WASHDC 9451

INFO USMISSION BERLIN

AMCONSUL BREMEN

AMCONSUL DUESSELDORF

AMCONSUL FRANKFURT

AMCONSUL HAMBURG

AMCONSUL MUNICH

AMCONSUL STUTTGART

UNCLAS BONN 18400

FOR COMMERCE/BIC/OIM

E.O. 11652:N/A

TAGS: BEXP, GW, WB

SUBJECT: GERMAN POSTS' INPUTS TO BIC TRADE PROMOTION PROGRAM
AND EVALUATION OF BEST EXPORT SALES PROSPECTS

REF: A) STATE A-9312; B) BONN 6710

SUMMARY OF GERMAN POSTS' UPDATE OF "BEST PROSPECTS" LIST FOLLOWS.
CATEGORIES ARE RANKED IN ORDER OF OUR JUDGEMENT OF BEST INCREMENTAL
SALES PROSPECTS.BACKUP DATA AND WORKSHEETS (PER ENCLOSURE 2)
WILL BE POUCHED TO BIC/OIM/WE-226 AFTER THE BEGINNING OF THE NEW
YEAR.

1. BUSINESS EQUIPMENT AND SYSTEMS

POST WITH GERMANY-WIDE RESPONSIBILITY: FRANKFURT

1972 IMPORTS FROM US: DM 712 MILLION (\$1.00 EQUALS DM 2.65)

US SHARE OF IMPORT MARKET: 27 PERCENT

ANNUAL GROWTH ESTIMATES FOR BEST SELLING US PRODUCTS:

25 PERCENT

HIGHEST POTENTIAL PRODUCT LINES: ELECTRONIC DESK CALCULATORS,

ELECTROSTATIC COPIERS

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2. COMPUTERS AND RELATED EQUIPMENT

POST: FRANKFURT

1972 IMPORTS: DM 442 MILLION (SEE FOOTNOTE 10)

MARKET SHARE: 39 PERCENT

ANNUAL GROWTH, BEST PRODUCTS: 25 PERCENT
HIGHEST POTENTIAL PRODUCTS: DIGITAL COMPACT COMPUTERS,
EDP CENTRAL PROCESSING UNITS, CENTRAL STORAGE UNITS,
PERIPHERAL STORAGE UNITS, PERIPHERAL INPUT/OUTPUT UNITS,
OTHER EDP RECORDING EQUIPMENT.

3. ELECTRONIC PRODUCTION AND TEST EQUIPMENT

POST: MUNICH

1972 IMPORTS: DM 135,000 (SEE FOOTNOTE 11)

MARKET SHARE: 56 PERCENT

ANNUAL GROWTH, CATEGORY AS A WHOLE: 25-40 PERCENT

HIGHEST POTENTIAL PRODUCTS: (ALL LATEST STATE-OF-THE-ART)
SEMI-CONDUCTOR AND INTEGRATED CIRCUIT PRODUCTION EQUIPMENT,
PRINTED CIRCUIT PRODUCTION EQUIPMENT, WIRING ASSEMBLY AND
OTHER INTERFACING EQUIPMENT, PASSIVE COMPONENT AND
MISCELLANEOUS PRODUCTION EQUIPMENT; AUTOMATIC COMPUTERIZED
TEST EQUIPMENT.

4. ELECTRONIC COMPONENTS

POST: MUNICH

1972 IMPORTS: DM 272 MILLION

MARKET SHARE: 27 PERCENT

ANNUAL GROWTH, WHOLE CATEGORY: 15-20 PERCENT

HIGHEST POTENTIAL PRODUCTS: SPECIAL POWER TRANSISTORS
(INCLUDING SI-R.F. POWER TRANSISTORS), MOS INTEGRATED
CIRCUITS, LSI MOS MEMORY INTEGRATED CIRCUITS, COS/MOS
DIGITAL INTEGRATED CIRCUITS, ZENER DIODES, CLOR TV TUBES,
CAPACITORS, HIGH-SPEED THYRISTORS, DRY-REED RELAYS, P.C.
CONNECTORS.

COMMENT: THROUGHOUT 1973 IMPORT DEMAND IN GERMANY FOR
SOPHISTICATED COMPONENTS FAR EXCEED THE U.S. ELECTRONIC INDUSTRY'S
CAPACITY TO SUPPLY. THIS SITUATION IS EXPECTED TO CONTINUE WELL
INTO 1974 AND MAY MAKE ANY MAJOR TRADE PROMOTION EFFORT REDUNDANT.
HOWEVER, FOR THE LONGER RANGE--AND PARTICULARLY FOR NEW-TO-MARKET
OR FIRMS WITH EXPORT CAPACITY--OPPORTUNITIES FOR SUBSTANTIAL
INCREMENTAL SALES DO EXIST.

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5. FLUID POWER AND TRANSMISSION EQUIPMENT

POST: FRANKFURT

1972 IMPORTS: DM 118 MILLION

MARKET SHARE: 21 PERCENT

ANNUAL GROWTH, BEST PRODUCTS: 10-15 PERCENT

HIGHEST POTENTIAL PRODUCTS:

--PUMPS: LEAKPROOF, CANNED CIRCULATION PUMPS FOR NUCLEAR
COOLING SYSTEMS; SMALL PISTON PUMPS FOR HIGH-PRESSURE CLEANING;
HEAVY DUTY CHEMICAL PROCESS PUMPS FOR EXTREME PRESSURES AND
TEMPERATURES, SPECIAL SLURRY PUMPS.

--VALVES: ALL-PURPOSE ELECTRO-MEGNETICALLY ACTUATED
CONTINUOUS PROPORTIONAL CONTROL VALVES, LEAKPROOF VALVES FOR
NUCLEAR REACTOR COOLING SYSTEMS, MONEL AND STAINLESS STEEL GATE
AND BALL VALVES FOR 9000 PSI OPERATION.

--COMPRESSORS: HIGH QUALITY, HIGH CAPACITY RADIAL AND AXIAL
PISTON AIR AND GAS COMPRESSORS; HIGH PRESSURE CENTRIFUGAL
COMPRESSORS FOR POLYETHYLENE PRODUCTION.

6. METAL WORKING AND FINISHING MACHINERY AND EQUIPMENT

POST: DUESSELDORF

1972 IMPORTS: DM 83 MILLION (SEE FOOTNOTE 11)

MARKET SHARE: 15 PERCENT

ANNUAL GROWTH, WHOLE CATEGORY: 15 PERCENT

HIGHEST POTENTIAL PRODUCTS: METAL CUTTING TOOL MACHINERY;
METAL FORMING TOOL MACHINERY; AUTOMATIC LATHES; JIG BORING
GRINDERS; GEAR CUTTING AND FINISHING MACHINES; PUNCHING,
SHEARING, BENDING AND FORMING MACHINES; LASER-BEAM WELDING AND
CUTTING EQUIPMENT; ELECTRON-BEAM WELDING AND CUTTING MACHINES;
NUMERICALLY CONTROLLED WELDING MACHINES; SPECIAL-PURPOSE/SPECIAL
DESIGN WELDING MACHINERY; MICRO-WELDING APPARATUS; "SHIELDED
ARC" WELDING EQUIPMENT FOR MAINTENANCE APPLICATIONS; POWER
HAND TOOLS.

7. HEALTH CARE INDUSTRIES EQUIPMENT AND INSTRUMENTATION

POST: STUTTGART

ESTIMATED 1973 IMPORTS: DM 48 MILLION (SEE FOOTNOTE 11)

MARKET SHARE: 14 PERCENT

ANNUAL GROWTH, WHOLE CATEGORY: 10 PERCENT

HIGHEST POTENTIAL PRODUCTS: ELECTRIC/ELECTRONIC DIAGNOSIS
EQUIPMENT, ELECTRIC/ELECTRONIC THERAPY EQUIPMENT, ORTHOPEDIC
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APPLIANCES

8. PROCESS CONTROL INSTRUMENTATION

POST:STUTTGART

ESTIMATED 1973 IMPORTS: DM 42 MILLION (SEE FOOTNOTE 11)

MARKET SHARE: 13 PERCENT

ANNUAL GROWTH, WHOLE CATEGORY: 10PERCENT

HIGHEST POTENTIAL PRODUCTS: NOT AVAILABLE

9. GRAPHIC ARTS EQUIPMENT

POST: FRANKFURT

1972 IMPORTS: DM 38 MILLION

MARKET SHARE: 24 PERCENT

ANNUAL GROWTH, BEST PRODUCTS: 20 PERCENT

HIGHEST POTENTIAL PRODUCTS: PHOTO-TYPESETTING EQUIPMENT,
COMPUTERIZED COMPOSING SYSTEMS, VIDEO EDITING TERMINALS,
AUTOMATIC FILM PROCESSORS, ELECTRONIC ENGRAVING EQUIPMENT FOR
LETTERPRESS AND ROTOGRAVURE; PRE-PRESS COLOR PROOFERS, SMALL
SHEET-FED OFFSET PRESSES, LARGE WEB-FED OFFSET PRESSES, SCREEN
PRINTING EQUIPMENT, FLEXOGRAPHIC PRINTING EQUIPMENT, ELECTRO-
STATIC PRINTING EQUIPMENT.

10. (FOOTNOTE 10) DUE TO AN EXTENSIVE REVISION OF THE
CLASSIFICATION OF EDP EQUIPMENT IN THE OFFICIAL GERMAN FOREIGN

TRADE STATISTICS, THE FIGURES USED IN THIS SECTION ARE COMPLETELY DIFFERENT FROM THOSE USED IN THE PREVIOUS REPORT (REFTEL B). THE PREVIOUS REPORT WAS BASED ON DATA COMPILED BY DIEBOLD DEUTSCHLAND IN THE STUDY "THE MARKET FOR COMPUTERS AND RELATED EQUIPMENT IN GERMANY" (DIB 73-04-505). THE DISCREPANCY OF NEARLY 50 PERCENT IN THE TWO STATISTICAL SERIES CAN BE EXPLAINED ONLY BY ASSUMING THAT THE RESEARCH FIRM USED A CONSIDERABLY LARGER BASE OF COMMODITY NUMBERS THAN WE HAVE BEEN ABLE TO ISOLATE AS EDP EQUIPMENT IN THE TRADE STATISTICS.

11. (FOOTNOTE 11) ON THE SAME BASIS AS DISCUSSED ABOVE, THESE ARE STATISTICAL ANOMALIES AND CAN NOT NECESSARILY BE COMPARED WITH THE FIGURES SUBMITTED IN REFTEL B. SOME OF THE EARLIER FIGURES WERE DERIVED FROM CONTRACT MARKET RESEARCH OR WERE COMPILED AT OTHER POSTS. DUE TO THE CONSTRAINTS OF TIME AND NON-AVAILABILITY OF THE ORIGINAL RESEARCHERS, IT HAS NOT BEEN POSSIBLE TO RECONCILE THE DIFFERENCE. HILLENBRAND
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